



## Xanatek Weekly Newsletter

July 25, 2008

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### **Autopay**

### **Tip of the Week!**

#### Scan Center -Scanning to Index (ISIS)

When selecting ISIS for scanning through Scan Center, there are three options:

1. Scan Person - scanning to the user who is logged into IMS.
2. Scan To - scanning to another selected IMS user.
3. Scan To Index - scanning directly into the client or prospect file.

When selecting to scan to index, place the group of papers in scanner that belong together in a single client file, in a single image folder. Press scan selection (single or duplex). The papers will be brought through the scanner and the option to transfer will appear automatically, allowing you to select the client (or prospect) file and the image group folder that the scanned group of images belong in. This saves you the additional steps of getting your documents and selecting them before transfer!

### **Fall Boot Camp**

Pay your monthly maintenance fee with Visa, Mastercard, American Express or Debit cards. If you are interested in automating your monthly payment contact us at [dburkart@xanatek.com](mailto:dburkart@xanatek.com) and we'll send you the paperwork!

### **Meeting Speaker**

If you have a coffee house meeting or some other type of monthly or quarterly meeting and have speakers. Xanatek would love the opportunity to present our company to your meeting! If you are interested in having a Xanatek representative attend your meetings, please contact [Brent@xanatek.com](mailto:Brent@xanatek.com).

### **Monthly Drawing**

### **Warm Referral Contest**

We are raising the stakes to a \$100 Visa Gift Card!!! For the month of July we want warm referrals. What is a warm referral you ask? A warm referral is someone that you contact and tell about Xanatek and our IMS product before referring them to us. For every warm referral you send our way in the month of July, your name will be entered into the drawing for the \$100 Visa Gift Card! That's right you can enter as many times as you want. All we need the referred agencies contact information, the person you contacted there and the last date you spoke to them about us! It

Want to get more out of IMS? IMS Boot Camp will inform, educate, and stimulate your office! We limit each class to a maximum of 12 people.

In most cases at least 8 agency's will be represented from various states. The classroom environment provides the opportunity to learn from our instructors and your classmates. Each attendee is supplied with a computer so they may work along with the instructor. Ample time is given for questions and open discussions.

Xanatek provides lunch both days and all your classroom material!

We have fun too! Thursday night you are encouraged to have dinner with the group to further your discussions. After dinner, voluntary attendance to relax and enjoy downtown South Bend at one or more of our establishments!

Our next Boot Camp is now scheduled for September 18th and 19th, 2008!

Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

doesn't stop there your agency will also receive a referral bonus for any referrals that become Xanatek customers! See additional article below for more details on agency referral bonuses.

Please send your referrals to [jmburkart@xanatek.com](mailto:jmburkart@xanatek.com)

### **Updated Referral Program**

Make \$100.00 to \$500.00 by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases IMS3 and for Image Archiver.

Please send us email, fax, or phone call before the prospect makes a purchase. We often get many people saying they refer the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. We will no longer pay the referral fee after the client has purchased and you have not contacted us. Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.

Here are the rules:

1. The lead has to be new to Xanatek. If Xanatek has already spoken to the lead, it does not qualify.
2. You have to notify us of the lead. Please call, fax, or email us with the lead information before they purchase. We must get name and phone number to contact them. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.
3. First come first serve - Sometimes we will have more than one person refer the same agent. We will pay the referral fee to the first agent who tells Xanatek about the lead.
4. Paid-in-full - The fee will be paid after their bill is paid.

Here are some additional tips:

- Have the lead remind us where they heard about us. In other words, have them tell us that you sent them.
- Feel free to ask us how it's going! If you refer someone, we would be glad to keep you informed about the sales process.

Xanatek may change this program at anytime. We also reserve the right to

distribute the amount between multiple lead generators when necessary. Amount of referral fee will be set at time of sale and is based upon purchase price paid by the lead.

### **Call Center Available for Your Agency**

Until now, only large corporations with large budgets have been able to track and analyze all there incoming calls automatically! Xanatek is pleased to offer the Call Center! The Call Center is a powerful call tracking and reporting system that utilizes your incoming phone lines, caller ID and links with Insurance Management Solutions (IMS3). If you have looked for this technology in the past and found it to expensive, then look now, it's affordable! Just like IMS3, it will make your office more productive and efficient!

The Call Center has been designed to help you document and analyze your incoming and outgoing phone calls. All business owners know the importance of documenting conversations and logging all calls from customers. The Call Center will automate the process and much more!

Here are a few features that the Call Center offers:

- \* Logs all incoming calls
- \* Forces users to document conversations
- \* Tracks the number of calls each person handles
- \* Tracks all dropped calls
- \* Tracks all unanswered calls
- \* Tracks all transferred calls to voicemail
- \* Reports on average call length
- \* Reports on customers that call you the most
- \* Reports on daily call load (total number of calls)
- \* And much more!

The Call Center utilizes your current phone lines and caller id. All the equipment and warranty you need will be provided by Xanatek. No changes to your current phone system are needed. Some additional wiring may be needed.

### **Pricing**

- \* You must have Caller ID on each incoming phone line for the system to work. Number of incoming phone lines.

- \* 4 Lines ( \$1395 )
- \* 8 Lines ( \$1895 )
- \* 12 Lines ( \$2195 )
- \* 16 Lines ( \$2395 )
- \* 24 Lines ( \$3195 )
- \* 32 Lines ( \$3895 )

Monthly Fee Will be \$25 per month.

If you have more than 15 users - a separate computer may be required to run the system. Please contact Xanatek for more information or [tour](#) the website.

### **Commercial Downloads from Erie!**

If you have not yet downloaded your commercial book of business you can at anytime. All new requests are processed on Sundays at Erie. Meaning you will see your commercial downloads through the IMS AL3 Import Utility the week following your request.

Here are you few answers to some questions that you may have when visiting [www.agentexchange.com](http://www.agentexchange.com).

- Your IMS version is 3.
- You may go ahead and request all lines and your book of business.
- Erie has stated that they will be processing these submissions on Sunday. Then the next upload/download that you do for Erie will create the files for your IMS AL3 Download program.
- The process for Commercial downloads is no different than the personal lines that you are already receiving, so the process of assigning through your IMS AL3 Download program will be exactly the same.

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